

**Department of Defense (DoD)**  
**Civilian Personnel Management Service (CPMS)**  
**Field Advisory Services - *FAS***  
**Classification Appeal Decision**

<b>DoD Decision:</b>	<b>Classification Act (General Schedule)</b>
<b>Initial classification:</b>	Planner and Estimator, WD-2805/4607-08
<b>Organization:</b>	Navy Public Works Center Production Management Department Planning Division
<b>Date:</b>	November 21, 1996

### **Introduction**

On 1996, Civilian Personnel Management Service (CPMS) received a position classification appeal from, who are employed in the Public Works Center, Their positions are currently classified as Planner & Estimator WD-4607/2805-08. The appellants have stated their positions should be excluded from the Federal Wage System (FWS) and classified as General Schedule. In addition, we are required by Title 5 to classify positions based upon published Office of Personnel Management position classification standards, and not to other positions. This means comparison to standards, not to other positions, remains the exclusive method for classifying positions. To decide the proper classification of the position, it is necessary to first determine its pay category. The pay category aspect of the appeal has been accepted and adjudicated under the provisions of 5 U.S. Code 5103.

### **Sources of Information**

In deciding this appeal, we considered information obtained from the following sources:

- a. Appellants letter.
- b. Information submitted by the Human Resources Office
- c. In/out briefing with Executive Officer.
- d. Phone audit with appellants and on-site desk audits.
- e. Discussion with first and second line supervisory officials.
- f. Discussion with Shop General Foreman.
- g. A review of "Public Works Custom Builders Handbook", undated.

### **Job Information and Pay System Determination**

The job review indicates that the appellants prepare completed engineering contracts, projects, and reports. They prepare job orders; plan and estimate cost of maintenance, repair, alternations; and construction including mechanical, electrical, plumbing and utility projects. The record illustrates that the primary

purpose of the position is to plan and estimate hours, material, and type of repair and maintenance for Public Work jobs in the area. The duties consist of: receiving and reviewing customer work/job orders, and developing them into appropriate work statements; visiting the work area to determine the scope of the project, and explaining the work process to the customer; preparing detailed cost estimates covering labor, material, and equipment/machinery to accomplish proposed project. Reviewing proposals for completeness, accuracy, and reasonableness, and attend agency and contractor negotiation as required; preparing written reports which detail existing conditions of property and making appropriate recommendations; developing yearly plan identifying discrepancies and corrective action; and serving as project manager and providing technical guidance if contractors encounter unforeseen difficulties on site.

FPM Supplement 532-1, Subchapter S11a shows that a position is properly covered by the special plan for production facilitating jobs only if it is under the Federal Wage System and exempt from the Classification Act. The Introduction to the Position Classification Standards (page 26) indicates the following:

5 U.S. Code 5102 (c) (7) exempts from coverage under the General Schedule those "employees in recognized trades or crafts, or skilled in mechanical crafts, or in unskilled, semi-skilled, or skilled manual labor occupations, and other employees including foremen and supervisors in positions having trade, craft, or laboring experience and knowledge as the paramount requirement."

The "paramount requirement" of a position refers to the essential, prerequisite knowledge, skills, and abilities needed to perform the primary duty or responsibility for which the position has been established. Whether particular types of positions are trades, crafts, or manual labor occupations within the meaning of Title 5 depends primarily on the facts of duties, responsibilities, and qualification requirements; i.e., the most important, or chief requirement for the performance of a primary duty or responsibility for which the position exist. If a position clearly requires trades, crafts, or laboring experience and knowledge as a requirement for the performance of its primary duty, and this requirement is paramount, the position is under the Federal Wage System regardless of its organizational location or the nature of the activity in which it exists.

A position is exempt from the General Schedule if its primary duty involves the performance of physical work which requires knowledge or experience of a trade, craft, or manual-labor nature.

A position is subject to the General Schedule, even if it requires physical work, if its primary duty requires knowledge or experience of an administrative, clerical, scientific, artistic, or technical nature not related to trade, craft, or manual labor work.

We find that the appellants primary responsibility requires an in-depth, practical knowledge of a variety of shop operations, that trades or crafts experience and knowledge are desirable in carrying out that responsibility, and that the appellants have considerable experience in a particular field such as carpentry, electrical, mechanical, sheet metal, heating and air conditioning. However, the appellants primary responsibility does not absolutely require both experience and knowledge in trades or crafts.

The record infers that the appellants have had formal trades and crafts experience in a particular trade area (electrical, mechanical, structural, plumbing, etc.). This can be determined by reviewing the previous job description which has the parenthetical title, (i.e., Structural, Plumbing, etc.) and by examining background information submitted by the Human Resources Office (career path/growth). The career ladders indicate the appellants have trade backgrounds. The record does show that the appellants make plans and estimates not only with respect to a particular discipline, but also with respect to work in a variety of disciplines, such as carpentry, electrical, concrete work, air conditioning, and plumbing. We find that the appellants

primary duty does not require both experience and knowledge in trades and crafts. During the desk audits we learned that several appellants develop plans and cost estimates which cover not only their specialized fields, but include other areas and crafts. For instance, some of the appellants have had experience as sheet metal worker and maintenance foreman; or pipefitter and metal worker; or welder and maintenance foreman; or woodcrafter or inspector. Although they have had worked in previous positions, they prepare cost estimates encompassing a variety of other trades including electrical, mechanical, and masonry. The fact that the appellants make plans and estimates with regard to other trades and crafts areas, despite a lack of formal training and apprenticeship in those trades, indicates that persons occupying the positions of the appellants could make plans and estimates covering other trades without having formal experience. This is true despite the fact that management has typically limited recruitment from among journey level trades persons. Journey level experience in one trade does not fully qualify someone to perform work in another trade. The capability of preparing cost estimates in which the appellants have little experience or training demonstrates that persons occupying any one of the positions in question could accomplish the work without craft experience but with a practical knowledge of shop operations. For example, job order # requires the appellants to provide logistical support for a "Ship Commissioning"; or job order # which requires a complete renovation of building, which will require the use of several trades (electrical, HVAC, structural, plumbing etc); or job # which requires the installation of underground conduit. The more complex positions are required to complete a detailed work-flow-chart/timeline while other positions are not tasked with this responsibility. The former positions require regular contact with the Maintenance Superintendent to schedule the work for the shops.

The appellants planning and estimating work requires a number of knowledge's and abilities which can be gained in a manner other than through full performance trades experience. For example, they must know the techniques and processes involved in making optimum use of manpower, materials, and other resources. They must have an in-depth, practical knowledge of a variety of shop operations, and the ability to translate that knowledge into plans, estimates, and operational sequences or phases applicable to assigned projects. They must also be able to apply and adapt Engineered Performance Standards and other guides and references. We consider that these technical and administrative knowledge's and abilities (which are typical of GS positions) are paramount requirements. Moreover, they are characteristic of the knowledge needed by GS's at the higher grade levels who prepare cost estimates for a variety of construction projects as described in typical classification standards (i.e. GS-802).

The performance plan and desk audit indicate the appellants regularly use the Engineered Performance Standards (EPS) and "Estimator" which can determine labor hours, material/MRI's , and other cost factors. In addition, there are numerous precedent specifications, manuals (Grainger), and previous work orders which are readily available in the office. The appellants estimate material needed for each job by either referring to extensive historical data from previous jobs, or estimating needs based on EPS tasks, or an assist from another worker. The EPS is a job estimate system (carpentry, pipefitting, electrical, ceremonies, roads, etc.) which identifies by "task" and man-hours to accomplish the work. In addition, they have a "source" by calling professional engineers as needed. Additionally, the process of estimating work (labor, material, and total cost) is supplemented by the automated system called "Estimator".

The record indicates that while the appellants prepare sketches and specifications (not to scale/Autocad) for many projects, the planning and estimating work requires less detailed understanding of trades and crafts operations than a person would need to actually perform those operations. The record provides no evidence that the appellants planning and estimating work requires them to perform hands-on trade and crafts work on a regular and recurring basis. Based on the above, we find that although knowledge and experience of trades or crafts is desirable, and although the appellants may have such knowledge and experience, their position clearly does not require such knowledge and experience for successful

performance of its primary responsibility.

In order for a position to be exempt from the Classification Act, we note that its primary responsibility must not only require trades or craft experience and knowledge, but that requirement must be "paramount". That it must be the most important, or chief requirement for performing the primary duty of the position. Given this definition , we find that the appellants primary responsibility does not require trades or craft experience and knowledge, that requirement is not paramount; therefore, the appellants position does not meet the requirement for exemption from the Classification Act.

**DECISION: Classification Act (General Schedule)**